

Get

**CONNECTED**

qb intuit  
quickbooks.

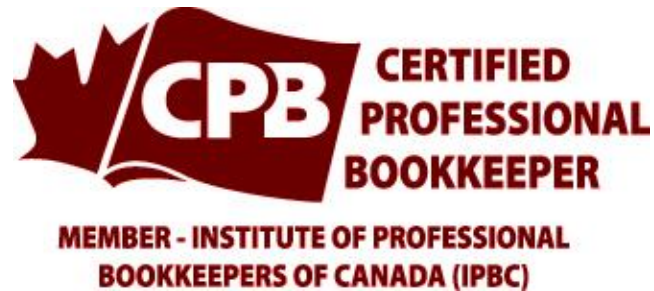
# The Transition to Proactive Bookkeeping

Dianne Mueller CPB  
@dmuellercpb

qb intuit  
quickbooks.



Take a few moments  
to **Connect** with  
your neighbour



# Today's speaker

**Dianne Mueller CPB**

The Bookkeeper's Advocate<sup>®</sup>.

@dmuellercpb

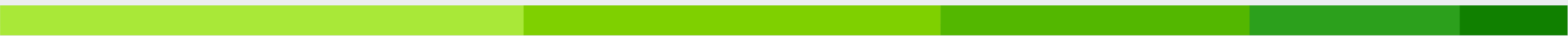
@IPBC\_Canada

# Agenda

**Why?**

**How is it different from the traditional bookkeeping role?**

**What new skills and tools do proactive bookkeepers need?**



**Sadly**

---

40% of small business is  
profitable

---

30% of small businesses break  
even

---

30% continually lose money

# **The Role of Proactive Bookkeeping in Business Success**

**goes beyond traditional  
bookkeeping**

**effects sustainability**

**new foundation for business  
growth**

# What is Proactive Bookkeeping

**cost effective**

**manages risk**

**provides real-time data**

**examines patterns/data analyses**

# A Proactive Bookkeeper

- relationship builder
- risk manager
- systems expert
- understands value
- strategist
- professional association member
- educator of their clients
- team player and a collaborator



# Proactive Bookkeeping Tools

**KPI's**

**risk management**

**automation**

**certification**

# Financial

kpi's- key performance indicators

financial ratio calculator

cashflow benchmarking tools

NAICS Codes – [www.statcan.gc.ca](http://www.statcan.gc.ca)

# Risk Management

secure emails

password encryption

employee privacy policy

banking password policy

document retention

# Technology

automate everything

communication tools

multiple monitors

backup systems



# Looking inwards

niches are riches

continuous learning

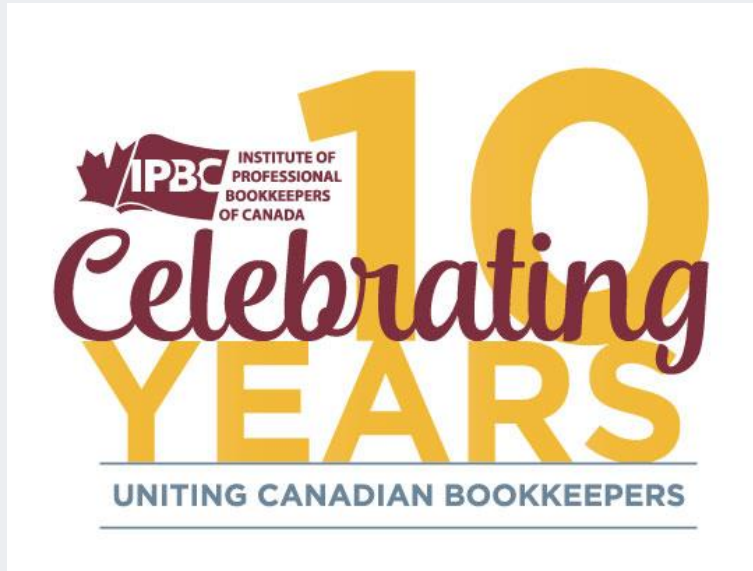
value pricing/billing first of the month

onboarding procedures

insurance



# Institute of Professional Bookkeepers of Canada (IPBC)



IPBC provides the environment, knowledge, and resources its members need to develop excellence in bookkeeping, through education, networking, advocacy, information and research.

The focus is to create member value and benefits that in turn contribute to creating a stronger trust relationship with Canadian business.



*This empire isn't going to build itself*  
*Get proactive*

The Bookkeeper's Advocate®



# Questions?

[info@ipbc.ca](mailto:info@ipbc.ca)

[www.ipbc.ca](http://www.ipbc.ca)

866-616-IPBC (4722)





Get

**CONNECTED**

